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## Introduction

In 2005 the Secretary of State and the State Librarian re-issued the 1996 Public Library Standards without making any changes to the document. The past seventeen years have seen a lot of changes in public library service, particularly in the areas of technology and marketing. In February 2012 a committee was formed to review and revise the 1996 Standards.

This new committee was driven by the same fundamental concerns as the previous committee. First, that the standards must be a means for the Missouri public library community to accomplish the following tasks:

- 1. To stimulate the growth and development of public libraries and to provide a tool to be used in the development of goals.
- 2. To motivate the improvement of quality and the effectiveness of service.
- 3. To develop a concern and appreciation for the necessity of evaluation and public accountability.
- 4. To provide a vehicle for eliminating barriers as well as a reminder that all Missouri citizens need and deserve quality library service.

Secondly, that the writing of public library standards raises complex issues and engages different opinions and perspectives. The 2012 committee sought input from a number of different sources. Suggestions from the Missouri Public library Directors and regional library groups have been incorporated into the document.

The standards document was adopted by the Missouri Library Association at its 2013 annual conference. The association transmitted the document to the Office of Missouri Secretary of State Jason Kander for consideration as official state standards. The Secretary's Council on Library Development and Secretary Kander approved the standards in December 2013.

"We are very pleased to accept these updated standards to help guide public libraries in improving services to their communities," Kander said.

The standards document represents an attempt to codify a sense of ideal library practice in concrete terms. The standards themselves are written as statements of the conditions necessary for effective library service. The standards are supported by guidelines whose achievement contributes to the creation of those conditions.

# Use of the Standards

The use of the public library standards requires strong commitment on the part of the library director and the board of trustees. Some of the standards can be achieved through time, energy and leadership. Others also require an increase in funding. Securing additional funding requires significant efforts at the local and state level. To support those efforts, it is vital that public libraries provide a strong foundation for their service.

The first commitment necessary is one of time. Library directors and trustees should plan to devote a year to studying the standards and measuring their library against this document, which will assist in enhancing the service currently offered and lead the library to the next level of service needed by its community.

Boards should divide the standards into manageable sections and devote time at each board meeting to the area chosen for discussion at that meeting. Working through the standards this way will allow trustees and directors to take a close look at the library's practices. It will provide opportunity for discussing ways to change and improve the delivery of service.

This document will serve well as an evaluation tool. As the trustees and library director take a close look at current plans and services, it will assist them in determining the direction in which the library should move. With this information in hand and employing long-range planning techniques, the board and administration will be able to move the library forward and make it stronger.

# Structure, Governance and Administration

All Missouri residents should have legally-established, readily accessible, public library service capable of connecting each individual with the comprehensive information resources of the region, state, and nation. Public library districts are established and maintained according to the provisions of the Missouri Statutes and are funded by property and/or sales tax revenue, state, federal and private funds.

All Missouri public library districts are governed by library boards or as otherwise provided by law. Board members observe their full legal responsibilities, duties, and rights by holding regular meetings, employing legal and other counsel as necessary, and attending board meetings regularly. The board has complete authority, within legal limits, over the library district's budget and policies. The board follows statutory requirements as to fiscal year, audit, annual and other reports, and the budgeting process. The library board also appoints the library director who acts as technical advisor to the board, enforces library policies and is responsible for all day-to-day management of the library district.

## **Standards**

- 1. The library district is legally established and operates in accordance with Chapter 182 of the *Missouri Revised Statutes*.
- 2. The library district has a governing board with appointments and terms of members in compliance with state statute. Recommendations to the appointing body should reflect the demographics of the population served by the library district.
- 3. The board's first priority is to guarantee that all residents of the library district have access to tax-supported public library services.
- 4. The board establishes written bylaws that outline its purpose, its operational procedures and address conflict of interest issues.
- 5. The board adopts written policies for operating the library district and reviews them on a regular cycle. These policies are available for public inspection. (See List of Policies on page 9.)

- 6. The library district has a written mission statement which clearly defines the purpose of the public library in its community.
- 7. The library district has written plans for strategic planning, technology, collection development, and other areas as necessary. The plans state goals and objectives for improvement of library services and are available for public inspection.
- 8. The board employs the library director, provides for the professional development and evaluation of the director, and delegates active management of the library district to the director. Board members are not involved in the day-to-day operation of the library district.
- 9. The board annually sets the library district's tax rate and approves the library district budget.
- 10. The board has responsibility for the expenditure of all monies collected, donated or appropriated for the library district.
- 11. Board meetings are held as specified in the bylaws, at a time and place convenient for the board, library director and for the community, in accordance with Missouri state law on public meetings.
- 12. The board complies with Missouri law and any federal laws which affect library district operations.
- 13. Board members and library staff actively participate in the legislative process to effect change that will benefit library district users.
- 14. The board assures that adequate records and statistics on library operations are kept.
- 15. The board ensures adequate funding for the space, staffing, equipment, technology, and materials needed for library programs and services.
- 16. All board members participate in continuing education activities.

_1. In addition to the types of library districts outlined in Chapter 182 of <i>The Missouri Revised Statutes</i> , public libraries may also combine districts to form regional library systems. <i>Standard #1</i>
2. The board develops and maintains bylaws and reviews them on a regular cycle. Standard #4
_3. A written statement describes the responsibility of board members and differentiates them from the responsibilities of the library director. Board members avoid participation in the administrative or operational aspects of the library district. Standard #8
_4. Board members have staggered, finite terms of service as outlined in <i>The Missouri Revised Statutes</i> or library district bylaws. Bylaws may provide for term limitations and the mid-term replacement of board members who cannot or do not fulfill their responsibilities. <i>Standard #2, #4</i>
_5. Bylaws and/or policies provide the library district with safeguards against conflict of interest. Standard #4
 _6. The Board has an approved policy which details how nonresidents may use the library. Standard #3, #5
_7. Meetings of the board are held at a regularly scheduled time at least nine times a year. The Bylaws indicate how the date or time of board meetings may be changed. Board meetings are open to the public and are held in accordance with state and local laws on public meetings.  Standard #11
_8. The library director is present at all board meetings and provides current library district financial and statistical reports for review. <i>Standard</i> #11
_9. The library district provides board members with errors and omissions
insurance coverage. Standard #10  10. The board president or designee and the library director provide all new
board members with an orientation to the library district including a review of the bylaws, library laws, policies, services, facilities, finances, practices of the board, and other appropriate administrative issues.  Standard #1, #4, #5,#16

11.Board members participate in at least one professional development activity every year. This can include webinars, presentations and discussion at board meeting or conference programs. <i>Standard</i> #4
12. There is provision in the library district budget for institutional or board member's dues to regional, state, and national library organizations. Standard #9, #16
13. The board, in accordance with its fiduciary responsibility as a public entity, is responsive to the community and does not act capriciously in fulfilling that responsibility. Standard #9, #10
14. The board and the library administrative staff are familiar with and comply with Missouri library law and any other Missouri or federal laws which affect library operations, such as ADA, minimum wage, hiring practices, unemployment compensation, criminal theft of library materials, privacy, freedom of information, etc. <i>Standard #12</i>
15.The board carries full responsibility for the library district, its budget, and its policies. <i>Standard</i> #3, #9,#14
16.The board selects and appoints the library director and conducts an annual evaluation of the director. Standard #8
17.The board and the library director jointly develop goals and objectives for the library district and a plan for achieving them. <i>Standard</i> #7
18. The board and the library director jointly study, plan, develop, and adopt library policies and regulations and review them regularly. These written policies are approved by the board and are available to the public. The library director is responsible for developing library operating procedures based on these board approved policies. <i>Standard #5</i>
19.The library district uses surveys and other feedback tools and measures to determine the effectiveness of its services. At least every five years the library district conducts a study that includes users and non-users of the community and its needs. Every three years the library district conducts a survey to determine library user needs. <i>Standard</i> #7
20. The board plans for execution and maintenance of adequate records on library operation, including those statistics and records as delineated in Missouri Records Management Law and those required by city and county

government, the Missouri State Library, the American Library Association, and other agencies that collect library data. <i>Standard</i> #14
21. The minutes of the meetings of the board are made available to the public. $Standard~\#14$
22. The board encourages and develops ongoing trust, foundation and endowment funding, the income of which enhances and supplements the library district's ability to deliver programs and services. Standard #10
23.The board ensures that the staff has safe working conditions and appropriate professional development opportunities. <i>Standard</i> #15
24.The board provides salaries and benefits competitive with the local or area markets where education, job description, level of responsibility, and experience are comparable. Standard #15
25.The board provides salary schedules based upon measurable criteria such as levels of achievement, years of service, and college or continuing education hours/degrees. Standard #9, #15
26.The board and director maintain a written plan of emergency procedures and a risk management plan. Standard #5
27.The library director maintains awareness of available grant and other outside funding sources. <i>Standard</i> #8,#15
28.The board enters into necessary contractual agreements to participate in resource sharing or consortiums with other libraries of all types. <i>Standard</i> #15
29.Board members advocate for the library district. Standard #13
30.The board encourages partnerships, volunteers, Friends and/or other support groups to work for or with the library district in order to broaden library services and increase community involvement. Standard #7
31.The board has a board succession plan in order to maintain a strong library board. Standard #2,#4

32.The board ensures that the budget has operational reserve funds adequate to meet library needs and to cover up to one additional year of expenses. Standard #9
_33.The library staff estimates the needs for future facility maintenance and repairs and the board annually reserves funds in the budget for those expenditures. <i>Standard</i> #9, #15
 34. The library has a board approved policy that provides patrons with the privacy/confidentiality allowed under <i>The Revised Missouri State Statutes</i> Chapter 182.817. Standard #5

## Responsibilities of the Library Board in Relation to the Responsibilities of the Library Director

Source: Based on The Library Trustee by Virginia Young. Used with Permission

#### **Library Board**

Serve as a policymaking body with fiduciary and oversight responsibility for the library.

Employ a competent and qualified librarian at an adequate salary to direct the library.

Determine and adopt written policies to govern the operation and program of the library.

Study the programs and needs of the library in relation to the community by keeping informed on community changes, trends, needs and interests.

Cooperate with the Director in planning services and support the director and staff in carrying out the strategic plan.

Know the services and needs of the library in relation to the community; and communicate them to the community.

Advocate for the library both from a financial and public relations standpoint by helping to secure adequate funds and by supporting an established public relations program.

Approve the annual budget.

#### Library Director

Responsible for the day-to-day operations of the library and the implementation of policy.

Act as technical advisor to the board; recommend needed policies for board action / orchestrate the employment of all personnel and supervise their work.

Carry out the policies of the library as adopted by the Board.

Study the programs and needs of the library in relation to the community by keeping informed on community changes, trends, needs and interests.

In cooperation with the Board, suggest and carry out a strategic plan for extending the library's services.

Prepare regular reports embodying the library's current progress and future needs.

Maintain an active program of public relations.

Prepare an annual budget for the library in consultation with the board and give a current report of expenditures against the budget at each meeting.

## **Library Board**

Become aware of local, state and national library laws. Actively support state and national library legislation which would improve and extend library service.

Establish among the library policies those dealing with collection selection.

Attend all board meetings and see that accurate records are kept on file at the library.

Attend regional, state, and national trustee meetings and workshops, and affiliate with the appropriate professional organizations.

Report regularly to the governing officials and the general public.

## Library Director

Become aware of local, state and national library laws. Actively support state and national library legislation which would improve and extend library service.

Select and order all books and other library materials, or assign to staff.

Attend all board meetings other than those in which the director's salary or tenure are under discussion.

Affiliate with the state and national professional organizations and attend professional meetings and workshops.

Represent the library to governing officials and the general public.

#### List of Policies and Guidelines

#### Library Administration and Governance

- Board Bylaws
- Meetings & Records Policy
- Board of Trustees Code of Ethics
- ALA Code of Ethics
- Investment Policy
- Record Retention Schedule
- Personnel Policy
- Sexual Harassment Policy
- ADA Policy
- Procurement Policy
- Investment Policy
- Disposal of Assets Policy

#### Library Safety & Security

- Incident Report Policy
- Weather or Emergency Closing Policy
- Weapons Policy

#### Library Collections

- Intellectual Freedom Policies
- Circulation Policy
- Collection Development Policy
- Selection Procedures
- Patron Comment on Library Materials Policy
- Gifts and Donations Policy
- Interlibrary Loan Guidelines
- Reference Policy

## Library Technology

- Technology Plan
- Public Computer Access Policy
- Wireless Internet Access Policy
- Computer Filtering Policy

Limiting Access to Material that is Pornographic for Minors Policy

#### Behavioral Guidelines

- Petitioning and Distribution of Literature on Library District Property Guidelines
- Community Bulletin Board Policy
- Meeting Room Policy
- Patron Behavior in Library Facilities Guidelines
- Public Service to Minors Guidelines
- Unattended Children Policy
- Food and Drink Policy

This is not a comprehensive list of all the approved policies each public library district should have. Rather, it is intended to be a starting point. Several Missouri public libraries have their policies available online. As of the creation of this document, some other state libraries, including Wisconsin and Kentucky, include suggestions and examples of policies online.

# **Finance**

A key responsibility of the board is to seek and secure funding from public and private sources and to monitor those funds in a way that supports the long-term sustainability of the library district.

The library director administers a board approved budget. The director presents monthly financial reports to the board and makes them available to the public. It is essential that libraries are as transparent as possible concerning the use of public money. Libraries should be proactive in this regard, distributing information on a consistent and reliable basis.

The library district's financial records are audited, as directed by the *Revised Statutes of Missouri*. The district maintains insurance adequate for the protection of district staff and board.

## **Standards**

- 1. The library district has a minimum tax rate of \$.20 per hundred dollars of assessed valuation, or a minimum support of \$25.00 per capita from all local funds.
- 2. The library district follows fiscal procedures consistent with state law in preparing, presenting, and administering its budget.
- 3. The director presents financial and statistical reports for review at each meeting of the board and makes them available to members of the public.
- 4. The library district maintains reserve funds for maintaining facilities and the replacement of furniture and equipment. These reserve funds reflect the future needs of the library district.
- 5. Library districts with a budget over \$1 million are annually audited by an independent C.P.A. firm with experience in governmental accounting. Library districts with a budget under \$1 million regularly conduct a financial review by an independent source with experience in governmental accounting.
- 6. The library district has insurance adequate to protect the district and its public.
- 7. The library district has a Conflict of Interest Policy.

parameters established by Missouri statutes and investment plans are reviewed annually. Standard #2
2. The library district complies with State Library requirements for reporting budget figures. Standard #2
3. Support from other local government entities, or grants and donations, may be use as local support. Standard #2
4. State and federal funding is not counted in calculating local support. Standard #2
5. Per capita support is expressed in 2013 dollars and is regularly adjusted for inflation. <i>Standard</i> #1
6. The board of trustees of the library district reviews and adopts an annual written budget presented by the director of the library district, as prescribed by the <i>Revised Statutes of Missouri</i> . Standard #2
7. Monthly documents reflecting budgetary balances and expenditures are presented to the board of trustees of the library district. <i>Standard #3</i>
8. The library district makes budgetary, auditing, management and reporting documents available for easy inspection by the public. <i>Standard #3</i>
9. The library district, as a corporate body and political subdivision of the State of Missouri, certifies a tax rate in a manner prescribed by the <i>Revised Statutes of Missouri</i> . Standard #2
10.The library district maintains an operational reserve fund to cover up to one year of expenses, and a separate capital fund for maintaining facilities and the replacement of furniture and equipment. Standard #4
11.Accounting firms providing audits or financial reviews are familiar with rulings by the Governmental Accounting Standards Board. Standard #5
12.An audit and management letter is sent to the State Library, the State Auditor, and the district's board-appointing bodies. Standard #5
13.The library district maintains liability insurance. Standard #6

 The library district bonds staff and board members with access to significant money. Standard #6
 The library district carries an errors and omissions policy on its board and staff. Standard #6
3. The library district has a policy outlining their own method of disclosing conflicts of interest as prescribed by the <i>Revised Statutes of Missouri</i> . Standard #7

## Personnel

Personnel are the library district's most valuable resource and usually account for the largest portion of the budget, generally between 60 to 70%. Library staff are responsible for carrying out the mission and the service plan of the library. All library staff should be competent, well-trained and able to provide high-quality service in a friendly and courteous manner.

## **Standards**

- 1. Each library district has a regular, paid and properly qualified director/chief executive.
- 2. Each library district has qualified and well-trained staff members who are able to accomplish the goals of the library.
- 3. The library district establishes full-time equivalents per 1,000 population served. (See Appendix I, pg. 15)
- 4. Written job descriptions clearly define all staff positions.
- 5. The library district has written personnel policies and procedures. (See Appendix III, pg. 17)
- 6. Personnel policies comply with federal and state laws and encourage diversity. (See Appendix III, pg. 17)
- 7. An orientation is provided for all new staff.
- 8. Salaries and benefits are commensurate with other Missouri libraries and the regional marketplace and do not exceed 60 to 70% of the total budget.
- 9. Professional development opportunities are available for all staff and staff are encouraged to take advantage of them.
- 10. The library contributes to the director's professional association dues.
- 11. The director regularly attends MPLD and MLA.
- 12. Staff participate in community engagement opportunities.
- 13. Director and staff have a set of core competencies. (see Appendix II, pg. 16)

- 14. All key library staff have email accounts and access to a workstation with Internet access.
- 15. Exit interviews are conducted with all staff who resign.
- 16. Staff's performance and accomplishments are appropriately recognized.

1. The director/chief executive has at least 60 semester hours of college credit for populations under 10,000; a Bachelor's degree for populations from 10,000-20,000; and a graduate degree in library and information studies from an ALA accredited program for population of 20,000+. Standard #1
_2.FTE suggested equivalents are in Appendix I, pg. 13. Standard #3
_3. Job descriptions include essential functions, education requirements and necessary experience directly related to the library district's service plan. Standard #4
4.Written hiring and termination procedures are in place. Standard #5
_5. Community demographics are kept in mind when recruiting and selecting staff.  Standard #6
_6. The board provides salary schedules based upon measurable criteria such as levels of achievement, years of service and college or continuing education hours/degrees. Standard #8
7. Supervisors regularly evaluate all staff members based on written job descriptions and annual goals and accomplishments. Standard #4
_8. Copies of personnel policies and practices are made available to all staff members. (See Appendix III, pg. 17) for suggested list of personnel policies.)  Standard #5
9. An orientation program introduces employees to the mission, philosophy, goals and services of the library district in addition to their job responsibilities. <i>Standard</i> #7
10.Staff participate in at least two training programs per year, either by in house webinar or away training, to enhance job competence or customer service or to lead to new areas of library service. Standard #9,#13

11.Staff regularly attend and participate in MLA conferences. The director staff participate in national library associations such as ALA, PLA or ARS	·
Standards #9,#10,#11	
12.Staff members who participate in appropriate professional development is supported through paid leave, release time, fee reimbursement, expenses, outlined in the library district's personnel policies manual.  Standards #8,#10	·

## Appendix I

## FTE'S PER 1,000 Population

Population Group	Current Average	Standard		Range
Statewide	0.58	0.34	-	0.69
Under 1,500	0.66	0.37	-	0.81
1,500-2,999	0.69	0.42	-	0.79
3,000-5,999	0.73	0.4	-	0.81
6,000-9,499	0.61	0.37	-	0.84
9,500-14,999	0.43	0.32	-	0.51
15,000-29,999	0.45	0.29	-	0.55
30,000-74,999	0.39	0.23	-	0.57
75,000 & Over	0.65	0.34	-	0.73

Source: 2011 Missouri Public Library Annual

Statistical Survey

Compiled by: Library Development Division,

Missouri State Library

The library employs paid staff at a level to meet the standard range. FTE (Full Time Equivalents) are given. 40 hours per week is set as the measure of full-time employment. To determine full time equivalents of employees, take the total number of hours worked by all paid employees and divide by 40. For example, a library with 70 hours of paid employees is considered to have 1.75 FTE

## **Appendix II**

## **Core Competencies**

## **Directors**

## Ability to:

- Understand the legal framework in which the library operates
- Assess needs
- Set objectives, as well as, evaluate and measure the effectiveness of public library programs
- Select materials and provide guidance in the use of all library resources
- Manage, organize and maintain library collections
- Work within the political and social structures of the community
- Communicate and work effectively with board members and staff
- Make use of current and emerging technologies for information and communication
- Manage financial resources
- Manage fundraising, including grants, gifts, endowments, etc.
- Manage human resources
- Provide continuing education

## **Staff Members**

- Be able to explain library district policies to the public
- Be committed to the provision of excellent service to the public
- Be well trained in the procedures required by their position
- Have an understanding of the history and development of library services
- Project an image of competence and courtesy to the community they serve

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## **Appendix III**

## **Personnel Policies**

A personnel policy should address the following elements.

#### **Employment**

- Recruitment
- Selection
- Promotions
- Staff evaluations
- Corrective action
- Due process
- Resignation & dismissal
- Retirement
- Salary schedule
- Dress & personal hygiene
- Continuing education

## Hours of Work & Scheduling

- Rest breaks & meal periods
- Compensatory time
- Holidays
- Emergency closings

## Working Environment

- Harassment
- Drug policy
- Cell phone
- Social networking
- Family in the workplace

## **Employment Benefit Programs**

- Insurance
- Retirement Benefits
- Worker's Compensation

## Vacation & Leave

- Vacation
- Sick leave
- Bereavement Leave
- Leave Without Pay
- Family Medical Leave
- Military Leave
- Jury Duty

## **Staff Recognition**

• Service Awards

# Public Library Services

The services of the public library are designed to meet the needs of the community it serves. Specific plans for library services are developed as part of the library district's strategic plan.

## **Standards**

- 1. The library district has a written plan to meet community needs, developed by the board and staff with input from the community.
- 2. Library hours are set to meet community needs and include morning, afternoon, evening, and weekend hours each week.
- 3. The library is open to everyone. Full library services are available to all residents of the library district regardless of age or abilities.
- 4. The library district has a written lending policy which specifies freedom of access, confidentiality of records, types of materials which are loaned, citizen eligibility for library borrowing privileges, and requirements for those residing outside library district boundaries.
- 5. The library district provides services in the format that is most appropriate to the user's needs, regardless of the user's age or abilities.
- 6. The library district's practices and policies provide for protection of client confidentiality.
- 7. The library ensures that its staff are knowledgeable about the library district's services and programs, lending regulations and circulation practices, and respond to the public in a courteous, helpful manner.
- 8. The library offers outreach services to the community outside the library.
- 9. The library offers educational, recreational, informational, and cultural programming on its own, or in conjunction with other community organizations.
- 10. The library district's services include, but are not limited to, these core services:
  - a. reference and reader's advisory service,
  - b. services and programs for children, teens, adults and families,
  - c. circulation of materials,

- d. interlibrary loan or resource sharing for material not available at the library,
- e. public internet access,
- f. public computer access,
- g. basic computer training,
- h. public access photocopying
- i. public access faxing
- j. relationships with community groups,
- k. public programming, services for special populations, and outreach services
- l. public meeting space
- m. digital presence with its website and catalog and through social media

_1. The library district encourages input by citizens, in the development of its strategic plan through advisory groups, surveys, focus interviews, or other appropriate means. <i>Standard</i> #1
_2. The library district's annual budget reflects the core services and implementation of the strategic plan providing the blueprint for meeting the community's service needs. Standard #1
_3. The library district's strategic plan is reviewed and updated annually by board and staff. Standard #1
 _4. Staff who provide services participate in the planning and budgeting process. Standard #1
_5. The library district's governing authority has formally adopted and follows the principles of the American Library Association's intellectual freedom statements. Standard #1
_6. The library district's strategic plan specifies how access to services is provided during all the library's scheduled hours. $Standard~\#2$
_7. The library district meets or exceeds the following service hours: a. under 10,000 population—35 hours per week; b. 10,000-25,000 population—55 hours per week;

Standard #2 8. The library district allows lending of all library materials, except those judged irreplaceable or needed in the collection for basic informational services. Standard #4 9. The library district's circulation process provides accurate, reliable information about the materials collection and patron's use of materials. Standard #4 \_10.The library district keeps accurate, up-to-date records of patrons registered for library cards. Standard #6 11. Programming for all ages is used to help attract new users to the library, to increase awareness of library services, to provide the public with opportunities for lifelong learning, and to provide a neutral public forum for the debate of issues. The library provides a summer reading program for all patrons they serve, or cooperates with other libraries or agencies to provide the programs. Standard #9 12. The library district sets objectives for its programming activities and uses those objectives to evaluate the programs it offers. Standard #9 13. The board and administration specify and provide the materials, and staffing which will be needed to support these services. Standard #10 \_14. The library district's core services are reviewed and updated as part of the library's strategic plan. Standard #10 15.Reference and reader's advisory service for all ages are available on site and by telephone, or electronically during all library service hours. The library provides trained staff who are knowledgeable and capable of providing these services during all library service hours. Standard #10 16. The library provides timely responses to information requests, as monitored through appropriate output measures. Standard #10 17. Outreach services include collections and programming provided at or to other community locations (this can include delivering items by mail). Examples of outreach locations are: a. Adult daycares b. Daycares – including commercial, in-home, or Head Start

c. Mental health facilitiesd. Retirement facilities

c. over 25,000 population—65 hours per week.

25

- e. Correctional facilities
- f. Schools public and private
- g. Other community groups and events

Standard #8

\_\_\_\_18.The library district provides access or referral for citizens to appropriate literacy training. *Standard* #10

# Library Planning and Assessment

Each library district has a three-to-five year strategic plan for the development and provision of library services based on the needs of the citizens the library district serves. The library district's strategic plan includes the library's mission and/or vision, an assessment of the community served by the library district, and a statement of goals and objectives to be met in the time period of the plan.

Each library district includes in its planning process a description of the ways in which it evaluates library services to determine their value to the citizens the library district serves. The evaluation of library services focuses on how well the library district meets citizens' needs for services, achieves the goals outlined in the library district's plan, administers resources, and communicates library district services and accomplishments to citizens.

## **Standards**

- 1. The library district has a written mission statement which clearly defines the purpose of the public library in its community.
- 2. The library district has a written three-to-five year strategic plan that includes goals and objectives relating to administration and finance, personnel management, collection management, public services, technology, facilities, and public relations, and other areas as needed.
- 3. The strategic plan states goals and objectives for improvement of library district services.
- 4. The strategic plan is reviewed annually by board members and library employees, including an evaluation of progress toward the library's goals.
- 5. The library district employs a variety of evaluation methods to assess its effectiveness in achieving its strategic plan, including inputs, outputs, and outcomes.
- 6. The strategic plan and results of service evaluations are regularly reported to the library board and made available to citizens of the service area.

7. Evaluation results are used in planning improvements to library services and in developing and revising the strategic plan.

1. The library district develops library mission, goals, and objectives and a strategic
plan for achieving them based on community inputs. Standard #1
2. The library district conducts a formal study of community needs at least every five years. Standard #3
3. The library district conducts a user survey to determine library user needs at least every three years. <i>Standard</i> #3
4. Mission statement, plans, and goals are reviewed regularly to ensure that they are still representative of the community's needs. Standard #1
5. The library uses its strategic plan and appropriate measures to determine whether additional funding is necessary, and if so, pursues additional funding through grant writing, private fundraising, or increased tax support as necessary.
6. The library district uses appropriate output measures to compile required statistics for the State Library reporting survey. Standard #3
7. The library district sets objectives for its services and activities, and uses those objectives to evaluate the services and activities it offers. Both ongoing and new library services include appropriate methods of evaluation and reporting of results. Standards #3,5
8. The strategic plan is available for public inspection. Standard #6
9. Examples of documents related to strategic planning may be found at the Missouri State Library's website. Standard #5

# Collection and Resource Management

A collection of materials is central to the purpose of every library district. A library collection must serve a diverse range of existing and potential interests, needs and demands, and the nature of a public library's collection represents a compact with the community it serves. Communities change over time, and library collections must be responsive to change. No set of standards can or should try to determine the values local libraries and their communities use to guide collection management choices; however, standards can be a powerful tool with which to set guidelines for good practice.

The collection should be conceived as a living entity. Decisions to add or withdraw an item from a library district's collection must be subject to the same criteria. Each item in a collection represents a judgment in terms of its quality and usefulness, its contribution to the balance of the collection, and its responsiveness to community need and demand. In addition, decisions about the material owned by a library district must be made within a context of knowledge concerning material that can be accessed by and provided to the public, but need not necessarily be owned by or physically present in the library district. The primary purpose of these standards and guidelines is to provide a means by which librarians can explicitly define and describe their collection management practices.

## **Standards**

## **Collection Management**

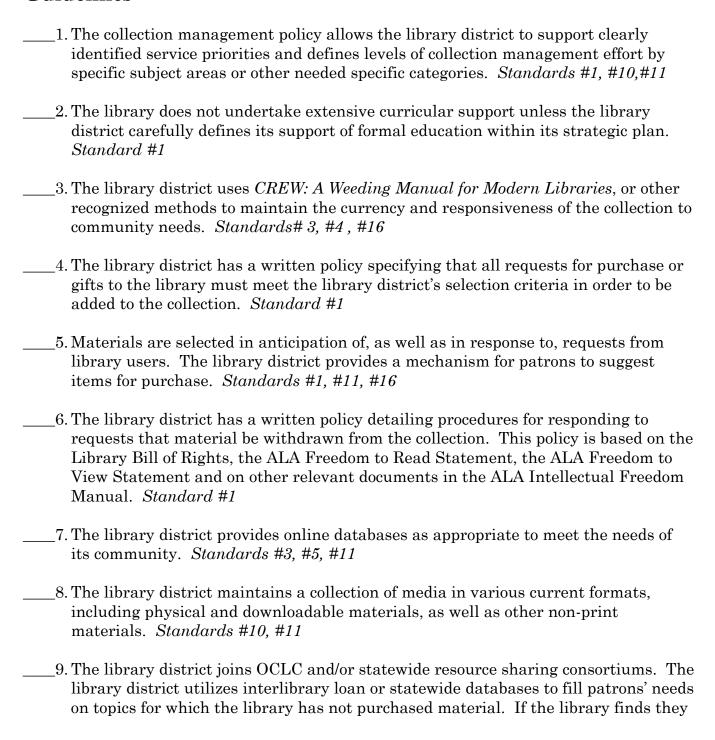
- 1. The library district has a written collection management policy that is based on the library district's strategic plan and services. The collection management policy is board approved, based on the principles articulated in the ALA Intellectual Freedom Manual, and is available to the public for comment and suggestions. The plan should include policies and procedures for:
  - a. Selection and weeding
  - b. Conservation/preservation
  - c. Procedures for handling requests for reconsideration of materials
  - d. Procedures for handling gifts and donations
  - e. Procedures for non-circulating items
- 2. The collection management policy is reviewed at least every three years.
- 3. The collection is continually updated to meet the changing needs, interests and ethnic and cultural diversity of the community.

- 4. Weeding is an essential element of collection development that ensures the library's materials are relevant and current. Items in the collection are evaluated continually for retention, replacement or withdrawal according to written selection and weeding criteria within the library district's collection management policy.
- 5. The library district utilizes resources that are available statewide or through other libraries and institutions.
- 6. The library district has a disaster plan outlining procedures to follow in case of fire, water or other damage to the collection.
- 7. The library district has a preservation plan for rare book and local history collections.
- 8. Annual circulation statistics are tracked in order to establish per capita and turnover rates for items in the collection.
- 9. The library district's collection is cataloged, organized and displayed in order to facilitate access.

## **Materials**

- 10. The library district collects material in a variety of formats and media supported by a variety of information technologies. The library district has a written policy statement concerning priorities and limitations with regard to format, media and technology that is specific to its own local community and collection management policy.
- 11. The library district maintains a current and adequate collection of materials representing a wide variety of viewpoints and subjects in print, electronic and other appropriate formats.
- 12. The library district allocates money in the budget for the purchase of library materials in a variety of formats based on the collection management plan.
- 13. Materials expenditures are between 15% and 20% of the library district's operating budget.
- 14. The library district participates in interlibrary loan as both a lender and a borrower. Its item records comply with machine readable standards and current national practices.
- 15. All library materials are accessible to all patrons, unless restricted by law or library policy.

16. The library district orders at regular intervals throughout the year to ensure a steady flow of new materials to the public.



must repeatedly request i	nterlibrary loan	material on the	e same topic,	they consider
purchasing material for th	neir own collecti	on on the topic.	Standards #	<sup>‡</sup> 5, #14

\_\_\_\_10.A circulation policy is in place that specifies borrowing eligibility.

Standard #5

# Physical Facilities

The well-planned library building is efficiently organized for use by patrons and staff. It allows for flexibility in space utilization, accommodates technology, provides an inviting interior, and is designed around the service needs of the community as reflected in the library's plan.

The roles of the library district in a particular community determine the type and number of physical facilities required. There is a welcoming atmosphere of openness which encourages a wide segment of the population to use the library and regard it as an essential component of community life. Libraries are a meeting place for many people and organizations in the community and work towards having space to accommodate this important function.

### **Standards**

- 1. The physical facility(ies) is/are adequate to carry out the library district's mission.
- 2. Buildings are sustainable both financially and environmentally.
- 3. Policies are in place that address usage, maintenance and improvement/expansion of the facility(ies).
- 4. Planning documents for library construction projects are based on a building program which includes information collected from tools such as the Public Library Data Service and other appropriate guidelines for library buildings and the library district's own strategic plan, service needs, site analysis, and internal space analysis. The library director consults with other librarians and visits other sites where a similar project is in process or has just been completed. Library consultants and other experts are used when appropriate.
- 5. All library district buildings are in compliance with federal, state, and local laws including fire, safety, sanitation, handicapped accessibility, energy conservation, and any other state and local codes or regulations.
- 6. Plans for new library construction or additions to existing buildings are designed by an architect certified to practice in Missouri. Engineers involved in construction projects are also certified by the State of Missouri. (RSMo 327.011-327.635)

  Architectural and engineering services are selected based on RSMo 8.285 8.291.
- 7. The minimum number of parking spaces, including adequate handicapped accessible parking spaces, is provided according to local ordinances.

- 8. Exterior lighting is sufficient to provide for the security of patrons and staff.
- 9. The annual budget includes appropriations for building and grounds maintenance, repair and replacement.

### **Guidelines**

General
---------

1. Usage statistics are maintained and compared to space allocation in order to ensure
library facilities meet demands of the community.
2. Facility usage is reviewed annually based on the following:
a. current space requirements
b. the most recent community analysis
c. changes in technology, services, size of collection, types of materials and
staffing levels.
3. Funds for current and future capital improvements and facility and grounds
maintenance are budgeted each year.
4. The building(a) island equipped with adequate telephone and data conscitute
4. The building(s) is/are equipped with adequate telephone and data capacity to accommodate library needs.
accommodate fibrary fiecus.
5. In the absence of any other building codes, the library district follows the
International Building Code.
E-starit and
<u>Exterior</u>
1. Exterior signs are highly visible and include hours of service. Signs directing people
to the library are installed.
2. All library buildings and grounds are clean, well maintained and well lit.
3. Convenient, sufficient, well-lit parking is located near or adjacent to the facility.
4. A convenient book return is provided during the hours the library is closed. A book
return that is attached to the library or inside the building is fire retardant.

#### **Interior**

1. Space is designed to encourage self-directed use of the library.
2. Interior signs are highly visible and comply with ADA guidelines as required.
3. Light in the library building is evenly distributed and free of glare.
4. For the comfort of public and staff as well as the protection of library materials, proper temperature and humidity control is maintained throughout the year.
5. Building design and layout provide for appropriate sightlines and control points for security. Security cameras are installed as needed.
6. Heating, air conditioning, and lighting designs are chosen to balance energy conservation, patron comfort, materials preservation and financial considerations.
7. Adequate public space and furnishings to fulfill the library's stated mission are
provided, such as for:
a. Story time and children's and YA programming
b. Group and individual study
c. Quiet space
d. Public meetings
e. Adult programming
f. Access and utilization of materials
g. Leisure reading
h. Public computing
i. Designated areas for children, teens and adults
j. Public restroom with diaper changing table
8. Separate, non-public areas for staff workspace, breaks and restroom are provided.
9. Adequate storage space is provided.
10.Easy access to electrical and cabling outlets to support current and future
technology is provided.

# **Technology**

Library technology is a critical factor in providing high quality library service, and technology should be integrated at all levels of the library organization. Technology continues to change and improve cooperative efforts among libraries, including their ability to share resources and increase efficiency of service delivery to patrons. Electronic information systems complement traditional materials; it is critical that libraries provide online connectivity to a variety of data sources.

Technology integrates with and supports every other Standard featured in this document. Investments in technology should be thought of in the same way as investments in facilities, collections and staff. Changing technologies will lead to changing services, with a consistent goal of maintaining relevance to the user population and needs of the community.

#### **Standards**

- The library district includes technology in its strategic planning, maintains a board-approved three-year technology plan, and regularly reviews technology needs.
   Technology includes, but is not limited to, hardware, software, networking, and peripheral devices.
- 2. The library district provides public access computers, internet access, wireless access, software, and hardware appropriate to the community's informational, educational, and recreational needs.
- 3. The library district maintains an up-to-date, universally accessible web presence and uses that web presence to provide information to its user community.
- 4. The library district uses an integrated library system to store collection and materials data and makes that data available in a shared bibliographic database.
- 5. The library district provides an online public access catalog (OPAC) that is available both at the library and remotely.
- 6. The library district has or contracts for personnel to provide technological support and troubleshooting in a timely manner and with minimal interruption to patron or library services.
- 7. The library district engages in practices to preserve the confidentiality, safety, and integrity of data collected by the library.

## Guidelines

_1. The library district's strategic plan provides for technology provision and maintenance. Standard #1
_2. The library district's technology plan is reviewed annually by staff. The technology plan addresses technology to support library district operations, staff, services, and programs. Standard #1
_3. The library district assesses its network and technology infrastructures annually and upgrades resources as needed. <i>Standard #1</i>
_4. The library district maintains board-approved written technology policies on topics including internet use, privacy and confidentiality, internet filtering, virus protection, ADA compliance, and other topics as appropriate to the community. Standard #1, #7
_5. The library district's disaster recovery plan includes provisions for dealing with technology and data. Standard #1, #7
_6. The library district's collection development plan includes access to databases, electronic materials, and other electronic media as appropriate to the community. Standard #1
_7. The library district establishes service targets for public use technology and electronic materials, and collects statistics on availability and use of technology and electronic materials . Standard #1
_8. Library district personnel study changing technology needs and implement changes for emerging technologies. $Standard~\#1$
_9. Adequate budgetary provision is made to provide, sustain, and refresh library district technology for staff and public use. <i>Standard #1</i>
_10.Adequate budgetary provision is made for staff training to maintain and upgrade technology and to teach patrons how to make the best use of technology. <i>Standard</i> #1
_11.The library district provides public access computers with a suite of productivity software (e.g. word processing, spreadsheets) and a printer. Standard #2
_12.The library district provides public access internet terminals with access to web browser and social media, in accordance with federal, state and local laws.  Standard #2

13.The library district provides accessible computers for patrons with differing disabilities, and staff know how to change computer system settings to use accessibility features in the operating system. Standard #2
14.The library district offers instruction on the library's online resources, eBooks, or other services using technology. Standard #2, #3
15.Where possible, the library has a separate computing area for children. In libraries where a separate computing area is not possible, libraries have the means to ensure that children's computer access can be limited in compliance with federal law or local ordinance. Standard #2
16. The library provides easy access to electrical outlets in the library building. Standard~#2
17. In remodeling or new construction of a library building, technological needs and potential advances are taken into consideration. Standard #2
18.The library provides dedicated high-speed wired and wireless internet access for patrons and staff. Standard #2
19. If internet access is filtered, the library district has a policy and procedure to allow patrons unfiltered access to information. Standard #2
20.The library district provides access to communication and online learning tools such as e-mail, chat rooms, and social media. Standard #2
21. The library district provides digital educational programs for children (e.g.,
22.The library district maintains an up-to-date, universally accessible web presence with basic information about the library, including hours, locations, and catalog access. Standard #3
23.The library district provides a web page with links to reliable local and/or informational resources. Standard #3
24.The library district's web presence is used for marketing library services and programs as appropriate. <i>Standard</i> #3

25. The library district provides 24/7 access to online resources such as the web site, catalog, and online databases. Standard #3, #5
26.The library district provides some form of electronic reference and reader advisory services (e.g., e-mail, virtual reference). Standard #3
27.The library district participates in appropriate telecommunications initiatives, networks, and consortia for shared services and resources. <i>Standard #4</i>
28. The OPAC has a graphical user interface that is universally accessible in design.  Standard #5
29.The OPAC provides online patron accounts with the ability to renew materials and place hold requests online. Standard #5
30. The library district allows patrons to place interlibrary loan requests online.  Standard #5
31. The library district has at least one staff member who is trained in system maintenance and troubleshooting, or contracts for such services, to resolve technological problems in a timely manner. Standard #6
32. The library district has at least one staff member who is trained to maintain the library's web presence and/or promote the library using web-based promotional tools, or contracts for such services. Standard #6
33.Public services library staff are available to offer assistance to library patrons using library-provided technology (computers, printers, library-purchased ereaders) during all open hours. Standard #2, #6
34. The library district provides technological tools and resources for the professional development of staff. Standard #2, #6
35.The library district adopts industry standards for physical and wireless networkin in remodeling or new construction of libraries. Standard #7
36.The library district follows best practices for PC, server, and network security, engaging in ongoing and overlapping security practices. <i>Standard</i> #7
37.Networking equipment is monitored for disruption or unauthorized intrusion, and library staff are alerted to disruption or intrusion.  Standard #7

38.If the library district's ILS accepts online payments, the library follows indust standards for secure online payment processing. <i>Standard</i> #7	ry
39.The library district follows current and standard practices with regard to licer and digital rights management of electronic media. Standard #7	ısing
40. The library district has a process and plans for maintenance of data backups conducts routine tests of its data backup measures. <i>Standard</i> #7	and

### **Technical Services**

The purpose of a technical services department is to make all library district materials easily accessible to users, other departments, and other libraries. The technical services department acquires, catalogs, classifies, and processes materials promptly and efficiently and maintains well-organized catalogs and files.

### **Standards**

- 1. Materials are cataloged using generally accepted standards.
- 2. The library district's catalog is stored in electronic format and is available on the library's ILS. The records of the collection, and changes to those records, are submitted to OCLC to enable resource sharing.
- 3. Materials are processed and made available to the public in a timely manner.

### **Guidelines**

_1. Each library district follows the cataloging standard accepted by OCLC. Standard #1
_2. On- and off-site methods of processing are evaluated for cost effectiveness and suitability for the library district's needs. <i>Standard #3</i>
_3. The staff is well trained and knowledgeable about cataloging and the ways in which the public uses catalogs and is offered the opportunity for continuing education on a regular basis. Standard #1
_4. The integrity of the catalog is maintained by sending updates of deletions and additions to OCLC on a quarterly or more frequent basis. <i>Standard</i> #2
_5. Catalog entries are updated regularly to reflect accurately the current collection with entries that are understandable, legible, and consistent in format. Standard #1
6. Locations and formats of items are clearly indicated. Standard #1

	og. Standard #1
8. Pub	c service staff members are kept informed of current trends or changes sification, cataloging, and subject headings. <i>Standard #1</i>
displ	for which users are waiting or items requested by staff for programs on the staff in programs of the staff in
	naterials are processed and labeled clearly, accurately and consistently. $lard\ \#3$
	erials are maintained through an ongoing program of mending, ding, or replacement. Standard #3
	rds of electronic and downloadable collections should be included in the y district catalog. $Standard~\#2$
13. The	library backs-up catalog records on a regular schedule. $Standard \# 2$
such	library district has access to the ILS modules appropriate to its needs, as cataloging, circulation, authority control, acquisitions, serials control ibrary loan, and other modules. <i>Standard #3</i> .

# Community Engagement

The library district's community is integral to any decision made concerning library operations. Libraries and communities have an interdependent relationship. Local communities provide libraries with funding, collaboration opportunities and advocates. A library contributes to the economic health of the community, preserves the memories of the community, and provides a place where people can explore, access resources, share ideas, and be transformed. The library is also a valued asset in addressing community-wide problems.

#### **Standards**

- 1. The library board and staff search for opportunities to cooperate with other community organizations including all types of libraries, governmental agencies, nonprofit organizations, and the private sector, in order to embed themselves in the community and ensure healthy communities that understand the value of libraries.
- 2. The library district uses a variety of means to reach out and cooperate with the community in order to stay knowledgeable about its needs. In addition, opportunities for community involvement within the library are made available to volunteers. Cooperation may include sharing of resources, staff expertise, training opportunities, or other joint activities. Staff representation in other community organizations is also essential.
- 3. The library has a Friends group and/or a Foundation that assists the library in fundraising, advocacy and reaching out to the community. Resources from these organizations do not replace the operating budget.

#### Guidelines

_1. Library staff understand the importance of community-wide connections by supporting and meeting with local groups. <i>Standard #1, #2, #3</i>
_2. The library district establishes cooperative agreements with other local governmental agencies for shared services. Standard #2
_3. Library staff collect, organize, and provide information about community organizations and issues. Standard #1
 4. Library staff participate in cooperative planning and programming with community agencies and share associated costs. Standard #1, #2

5. Library staff participate as both active members and leaders of community organizations and groups. <i>Standards</i> #1,# 2
6. The library district welcomes community volunteers as defined by a written volunteer policy. $Standard~\#2$
7. The library district has a staff person who is responsible for volunteer coordination and training. Standard #2
8. The library maintains a formal Friends or foundation group that meets on a regular basis with a staff liaison present. Standard #3
9. The library staff, the library board and the community are involved in cooperative long-range plans and fundraising activities. Standards #1, #2,#5
10.Friends and foundation funds are kept separate from library funds.  Standard #3
11. There are clear, written distinctions about the responsibilities of a Friends group versus a foundation. <i>Standard</i> #3
12.The library district collects statistics and conducts output and outcome measures, customer surveys, community studies, citizen surveys, and other means appropriate to the service program and resources of the library in order to remain relevant to the community. Standards #1,#2
13. Library staff actively seek new partnership opportunities. $Standards~\#1,\#2$
14.The library district participates in cooperative community literacy efforts.  Standards #1, #2, # 3

# Marketing

A well-rounded marketing program incorporates advertising, promotions and public relations to promote the library district's resources, services and programs, and is an integral part of the library's strategic plan. A library's marketing effort is guided by a marketing plan, a coordinated, continuous effort to communicate a positive image of the library district. It is designed to target local demographics (age, income and education of those living in your service area), reflect language(s) spoken in the community and address both external (patrons, general public, media and community leaders) and internal (staff, library board, volunteers, Friends' groups and partner organizations) groups.

#### **Standards**

- 1. The library district has a marketing plan.
- 2. The library district creates and maintains a professional image. The created "brand", including a logo, is consistent across all printed, electronic and verbal communication including indoor and outside signage.
- 3. The library district uses multiple ways to get its message to the public.
- 4. The budget includes funds for all aspects of marketing the library district and its services.
- 5. A library district spokesperson is designated so that all media inquiries go through one contact.
- 6. The audience for marketing is both internal (staff, library board, volunteers, Friends, foundations) and external.
- 7. The collection is marketed in an attractive and inviting manner.
- 8. All staff and board members are an important part of the public relations program of the library district.

#### **Guidelines**

\_\_\_\_1. The marketing plan includes measureable goals, objectives and strategies. Standard #1

2. The library district uses best practices in creating its market materials. Best practices include: selecting a logo that can easily be sized up or down and still be identifiable (free and low-cost resources are available online), establishing a color palette and selecting two primary typefaces to use in marketing materials (one good for headlines another one useful for text), using several weights and variations of the same font in one piece. Standard #2	
3. The designated library district spokesperson can use other pertinent library personnel to speak on topics for which they are a better resource.  Standard #5	
4. Library staff use the library's website, social media, radio, television, newspaper, brochures, fliers, posters, bookmarks, billboards, etc. to get the message out. <i>Standard</i> #3,#4	
5. Library staff produce an electronic or paper newsletter for the public, as well as, a staff newsletter. <i>Standard</i> #3,#4	
6. Library staff make presentations to community groups. Standard #3	
7. The library publishes and distributes an annual report. Standard #4, #6	
8. Library staff do regular walk-throughs of the building and grounds to assess the image that is being projected. <i>Standard</i> #2	
9. The library uses various kinds of shelving and display furniture and changes exhibits and displays frequently. Standard #7	
10.Library supervisors communicate to staff their important role in library public relations at their initial orientation and through periodic training sessions. Standard #8	
11.Board members discuss and understand their role in promoting the library.  Standard #8	

## Acknowledgements

The Secretary of State, the State Librarian, and the library community appreciate the dedication of the Missouri Public Library Standards Committee. Through the hard work of the following individuals, Missouri has an updated plan for enhancement of public library services.

Betty Martin (Committee Chair) Cape Girardeau Public Library

Denice Adkins
University of Missouri School of
Information Science and Learning Technologies

Brenda Allee-Bates Missouri State Library

Jim Brown
St. Charles City-County Library District

Melissa Carr Daniel Boone Regional Library

Regina Greer Cooper Springfield-Greene County Library District

Jan Johnson Daviess County Library

Nell Redhage Washington Public Library

Mary Beth Revels
St. Joseph Public Library

Patrick Wall University City Public Library

Robin Westphal
Livingston County Library